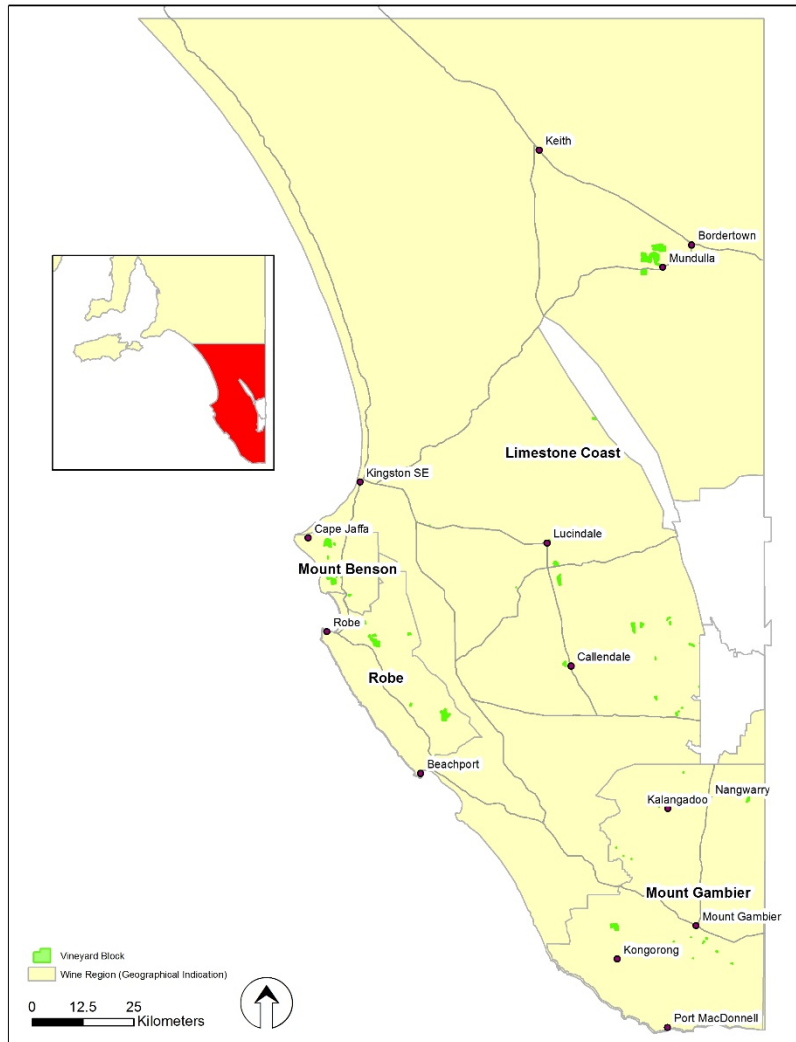


SA Winegrape Crush Survey Regional Summary Report – 2016

Limestone Coast (Other) Wine Region



DATUM: GDA84
PROJECTION: MGA Zone 54
DATE: 26th July 2013
SOFTWARE: ESRI ArcGIS v10.4
DATA SOURCE:
Vineyard Block - Vinehealth Australia
Wine Region - Wine Australia
Localities - SA Gazetteer
Road - DPTI

**Mount Benson, Robe, Mt Gambier,
and Limestone Coast other
Wine Regions**



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Explanations and Definitions

INTAKE (CURRENT VINTAGE) DATA

Definition of regions

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from Wine Australia.

Total crush

The total crushed is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 90%; however, individual regions may vary. Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

Calculated average purchase value

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May 2016).

The calculated average purchase value per tonne is the average amount paid per tonne of fruit across all wineries. Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements.

Important note on average purchase value

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts. Therefore the average price should not be compared directly with an individual grower's arrangement. It should also be noted that in minor varieties there may sometimes be very few purchases contributing towards a calculated average purchase value.

Price dispersion data (shaded columns in Intake Summary tables)

All purchases for each variety are grouped into categories according to the price paid for that fruit. The tonnes in each category are converted into a percentage of the total tonnes purchased, giving an indication of what share of fruit was purchased in each price range category. The categories are given nominal titles of A to E for convenience but these do not correspond with grades used by any particular winery.

Estimated total value of all grapes

The estimated total value of all grapes is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

Explanations and Definitions cont.

PLANTING DATA

Source of planting data tables

Planting data is not collected by the 2016 Australian Wine Sector Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia (formerly the Phylloxera and Grape Industry Board of South Australia).

Vinehealth Australia is required under the Phylloxera and Grape Industry Act 1995 to maintain a complete and accurate register of grapegrowers in the state. All vineyard owners with more than 0.5 hectares are required by law to register with Vinehealth Australia, and to report details of their plantings on an annual basis. This information is kept strictly confidential.

Vineyard plantings are recorded by Geographical Indication. Planting details for smaller regions not included in the survey report are available on request from Vinehealth Australia.

For more information on registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.

Explanatory notes for planting data tables

1. Planting data tables are current as at April 2016 and include all plantings from the 2015 planting season.
2. Vines planted in a particular year may include topworked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the 2016 report compared with previous reports.
3. Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce a slight error in totals or percentages.

LIMESTONE COAST (OTHER)

Limestone Coast zone (other) includes the GI regions of Mt Benson, Mount Gambier and Robe, and the vineyards around Bordertown, Lucindale, and Beachport, as well as those near but outside the declared GI regions of Padthaway, Coonawarra and Wrattenbully. The total area of vines included in this definition is around 2,834 hectares.

Vintage Overview – Mount Benson

Mt Benson had one of the driest lead-ups to the season on record (noting ours only go back 20 years). The winter-spring period was the second driest after 2006, and 40% below the average. This played a role in another unprecedentedly early start to the season. But the New Year seemed to mark a new beginning when it came to our weather and we had a series of long-overdue rain events that were met with mixed feelings by winemakers and growers. With our free-draining soil profile, quality seemed to hold up in spite of the wet, although there were isolated reports of crop loss due to berry split, depending on the variety and growth stage.

Winemakers in the area all seem extremely happy with the 2016 wines. Sauvignon Blanc, one of our stand-out varieties, fared reasonably well this year; however Pinot Gris for us was the front-runner in terms of whites. Chardonnay also produced excellent wines.

For reds, not the cracking vintage that 2015 was, but still very much above average. Cool to average conditions later in summer provided for terrific results in the well-balanced vineyards. The young wines display outstanding, bright and elegant characters reminiscent of a cooler growing season. Vineyards carrying too heavy a load struggled, especially Shiraz and Merlot.

Anna Hooper - Cape Jaffa Wines

Vintage overview

Overview of vintage statistics

The harvest from the Limestone Coast zone (other) was 20,667 tonnes, compared with 14,326 tonnes in 2015 – an increase of 44%.

The five-year average crush for this group of regions is 16,393 tonnes. The 2016 crush was the highest since 2009, while the 2014 crush of 12,728 tonnes was the lowest since 2002.

The total estimated value of fruit from this area was \$19.5 million compared with \$12.5 million last year. This represents over a 50% increase in value.

As well as the significant increase in tonnages, average prices of all the major red varieties increased: Shiraz up by \$52 to \$1055 per tonne, Cabernet Sauvignon up by \$155 to \$1055 per tonne and Merlot up by \$37 to \$797 per tonne.

The price dispersion data shows that 95% of red tonnages were purchased at between \$600 and \$1500, while for the whites, 75% were purchased between \$600 and \$1500 and 25% between \$300 and \$600.

There were no changes to the plantings in these regions over the 2015-16 planting season.

LIMESTONE COAST (OTHER)

Winegrape intake summary – vintage 2016

*Incorporates Mount Benson (2,326 tonnes), Mt. Gambier (945 tonnes), Robe (2,609 tonnes)
and Limestone Coast zone – other including Bordertown (14,788 tonnes)*

Variety	Tonnes purchased	E (less than \$300)	D (\$300- \$600)	C (\$600- \$1,500)	B (\$1,500- \$2,000)	A (above \$2,000)	Total value purchased	Calc avg. purch. value per tonne	Winery grown fruit	Total crushed ²	Est total value ALL grapes
Cabernet Franc	27	0%	0%	100%	0%	0%	\$26,700	\$1,000	337	364	\$363,860
Cabernet Sauvignon	2,431	0%	2%	96%	0%	2%	\$2,564,188	\$1,055	3,580	6,012	\$6,340,118
Malbec	68	0%	0%	100%	0%	0%	\$68,100	\$1,000	170	238	\$237,750
Mataro	186	0%	0%	100%	0%	0%	\$171,138	\$920	181	367	\$337,483
Merlot	628	0%	29%	71%	0%	0%	\$500,521	\$797	2,048	2,676	\$2,132,581
Petit Verdot	120	0%	0%	100%	0%	0%	\$111,730	\$935	376	496	\$463,665
Pinot Noir	259	0%	0%	100%	0%	0%	\$289,266	\$1,118	311	570	\$637,183
Shiraz	2,801	0%	0%	99%	0%	1%	\$2,954,724	\$1,055	2,811	5,612	\$5,919,892
Tempranillo	-	na	na	na	na	na	\$0		36	36	\$36,756
Other red	59	0%	0%	100%	0%	0%	\$53,208	\$897	7	66	\$59,486
Red Total	6,579	0%	3%	95%	0%	1%	\$6,739,574	\$1,024	9,857	16,436	\$16,528,774
Chardonnay	660	0%	57%	43%	0%	0%	\$393,647	\$597	1,761	2,421	\$1,444,670
Pinot Gris and Pinot Grigio	314	0%	0%	100%	0%	0%	\$290,979	\$928	16	330	\$306,172
Sauvignon Blanc	1,110	0%	13%	87%	0%	0%	\$885,506	\$798	165	1,275	\$1,017,177
Other white	20	0%	0%	100%	0%	0%	\$15,890	\$798	185	205	\$163,912
White Total	2,103	0%	25%	75%	0%	0%	\$1,586,022	\$754	2,128	4,231	\$2,931,931
Grand Total	8,682	0%	8%	91%	0%	1%	\$8,325,596	\$959	11,985	20,667	\$19,460,705

1 Percentages reflect pricing grade's share of purchases for each variety

2 It is estimated that the non-response rate (NRR) nationally is 10%, however the NRR will vary for each region. Generally, regions will have a lower NRR when there is a high proportion of purchased winegrapes within the region

LIMESTONE COAST (OTHER)

Current plantings by variety and year planted

Source: Vinehealth Australia

Bordertown Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
Red winegrapes						
Cabernet Franc	30	0	0	0	30	0%
Cabernet Sauvignon	415	0	0	0	415	0%
Malbec	21	0	0	0	21	0%
Mataro (Mourvedre)	43	0	0	0	43	0%
Merlot	219	0	0	0	219	0%
Other Red	19	0	0	0	19	0%
Petit Verdot	43	0	0	0	43	0%
Shiraz	333	0	0	0	333	0%
Total red varieties	1,122	0	0	0	1,122	0%
White winegrapes						
Chardonnay	88	0	0	0	88	0%
Other White	8	0	0	0	8	0%
Pinot Gris	12	0	0	0	12	0%
Sauvignon Blanc	8	0	0	0	8	0%
Semillon	10	0	0	0	10	0%
Verdelho	6	0	0	0	6	0%
Total white varieties	131	0	0	0	131	0%
Total all varieties	1,254	0	0	0	1,254	0%

Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
Robe						
Red winegrapes						
Cabernet Sauvignon	226	0	9	0	235	0%
Merlot	58	0	0	0	58	0%
Other Red	2	3	0	0	5	0%
Pinot Noir	46	0	0	0	46	0%
Shiraz	171	0	0	0	171	0%
Total red varieties	502	3	9	0	515	0%
White winegrapes						
Chardonnay	106	0	0	0	106	0%
Pinot Gris	15	0	0	0	15	0%
Sauvignon Blanc	43	0	0	0	43	0%
Semillon	12	0	0	0	12	0%
Total white varieties	177	0	0	0	177	0%
Total all varieties	679	3	9	0	691	0%

Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
Mount Gambier						
Red winegrapes						
Cabernet Sauvignon	13	0	0	0	13	0%
Merlot	1	0	0	0	1	0%
Pinot Noir	79	0	0	0	79	0%
Total red varieties	93	0	0	0	93	0%
White winegrapes						
Chardonnay	42	0	0	0	42	0%
Pinot Gris	33	0	0	0	33	0%
Riesling	5	0	0	0	5	0%
Sauvignon Blanc	117	0	0	0	117	0%
Other white	2	0	0	0	2	0%
Total white varieties	200	0	0	0	200	0%
Total all varieties	292	0	0	0	292	0%

LIMESTONE COAST (OTHER)

Current plantings by variety and year planted

Source: Vinehealth Australia

Variety	Current area in hectares				Total area	% planted in 2015
	Pre-2013	2013	2014	2015		
Limestone Coast zone - other						
Red winegrapes						
Cabernet Franc	2	0	0	0	2	0%
Cabernet Sauvignon	344	0	0	0	344	0%
Merlot	45	0	0	0	45	0%
Petit Verdot	3	0	0	0	3	0%
Pinot Noir	10	0	0	0	10	0%
Shiraz	136	0	0	0	136	0%
Total red varieties	540	0	0	0	540	0%
White winegrapes						
Chardonnay	41	0	0	0	41	0%
Riesling	4	0	0	0	4	0%
Sauvignon Blanc	9	0	0	0	9	0%
Other white	3	0	0	0	3	0%
Total white varieties	57	0	0	0	57	0%
Total all varieties	597	0	0	0	597	0%